

POST Configuration Management Process Action Team (PAT) Meeting

January 29, 2002
Natomas Park Conference Room 2
9:00am – 9:45am

1 MINUTES (DECISIONS FROM THE 29 JAN 02 MEETING)

Regulars	Representing	Present
Kent Matsuda	CMIPS	Yes
Dare-a Spiegle	CWS/CMS	No
Mark Wong	EBT	Yes
Dave Sakauye	SFIS	No
Linda Parr	WDTIP	Yes
Laura Okawa	PM Stds	Yes

Meeting Visitors	Representing

Questions related to this PAT should be directed to **Laura @ 263-4120** or email: lokawa@sid.hhsdc.ca.gov

- 1.1 The general purpose of the POST PATs and the POST implementation approach was reviewed.
- 1.2 The PAT schedule was reviewed. Meetings are scheduled as follows.

Configuration Mgmt PAT			
Mtg	PAT Focus	Date	Status
#1	Kickoff Meeting (Introductions, terms, objectives)	29 Jan 02	✓ Completed
#2	Scope of PAT	08 Feb 02	
#3	TBD	20 Feb 02	
#4	TBD	26 Feb 02	
#5	TBD	05 Mar 02	

- 1.3 The purpose and conduct of the PAT was reviewed. The scope for this PAT is not completely set yet. This PAT will not discuss Document Management or Change Control as these have been addressed previously in other PATs.
- 1.4 The team discussed the terms and definitions related to CM that had been derived in other PATs. See the attached PowerPoint handout.
- 1.5 The team discussed the typical things that need to be tracked by the project.
 - Asset and Inventory Tracking (hardware, COTS software)
 - Project Office Equipment – usually tracked by Pat Micco's group (SAWS LAN Support)
 - County Assets – usually tracked by the county once it is installed
 - Custom Software (e.g., MTS2, bpweb, WDTIP, ISAWS)
 - Project Office Tools – usually the responsibility of Pat Micco's group
 - Actual Development of System
 - ISAWS – use PVCS tool for welfare-to-work
 - WDTIP – use vendor's custom system
 - Network and Hardware Configurations (routers, IP addresses, telecom stuff)
 - Project Office – usually Pat Micco's group or the Cannery
 - County Site – usually the responsibility of the counties or Cannery

POST Configuration Management Process Action Team (PAT) Meeting

January 29, 2002
Natomas Park Conference Room 2
9:00am – 9:45am

The table shows the various types of CM and the responsibilities as currently implemented by the projects.

Who	Project Office	Pat Micco's Team	Contractors	Counties
What	<ul style="list-style-type: none">Document Mgmt/iManage	<ul style="list-style-type: none">POST ToolsHardwareCOTS Software	<ul style="list-style-type: none">Software ApplicationsSoftware Environment	<ul style="list-style-type: none">HardwareCOTS Software
Procedures or Guidance	<ul style="list-style-type: none">iManage Training/Manuals	<ul style="list-style-type: none">Team ProceduresCannery Request and Coordination Process	<ul style="list-style-type: none">Minimum rqmts for CM processes and tools in RFP/SOW	<ul style="list-style-type: none">County ProceduresState Guidelines and Standards
Change Control	<ul style="list-style-type: none">Project team proceduresHelp Desk Requests	<ul style="list-style-type: none">BPweb link for POST Suite Change Control	<ul style="list-style-type: none">Contractor/Project Change Control Process	<ul style="list-style-type: none">County Procedures

1.6 The team felt that a single tool for the project office really is not appropriate for inclusion in POST.

- Pat Micco's group may benefit from a centralized repository (if one does not already exist), but it does not really fit into the POST suite of project office tools.
- While it would be nice for the projects to have a centralized repository of county configuration information, there was doubt that it could be kept up-to-date in a reasonable fashion since the counties control this information.
- Also, since SID's primary business is software acquisition, not development, a source code control tool did not seem to fit into the POST suite either.

1.7 The team is considering closing out this PAT. At this point we do not feel there is a specific tool need for the project office that is not already covered in other PATs (doc mgmt, chg control, etc.). The next meeting will focus on making this final decision (not all participants were available for today's meeting).

Additionally, the PAT recommends more information be generated in the areas of county configurations and readiness. The following information should be gathered and assembled under the Implementation area of the BPweb.

- Standard checklists for use in assessing county infrastructure and readiness
- Centralized list of general information that is known about county sites, such as number of sites, number and types of configurations and circuits existing, etc.
- A list of contacts regarding county configurations
- Considerations/criteria for technology refreshes
- Considerations regarding coordination with the other applications and services in the county sites

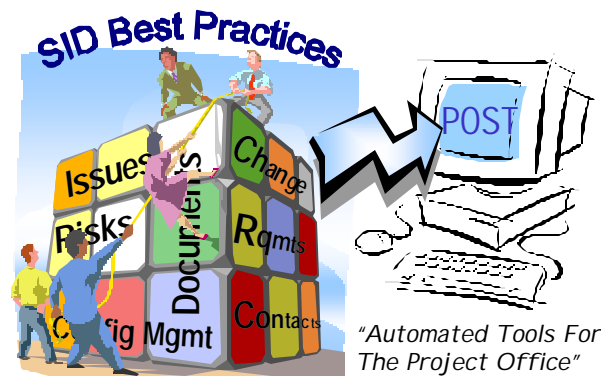
POST Configuration Management Process Action Team (PAT) Meeting

January 29, 2002
Natomas Park Conference Room 2
9:00am – 9:45am

2 AGENDA FOR THE 8 FEB 02 MEETING

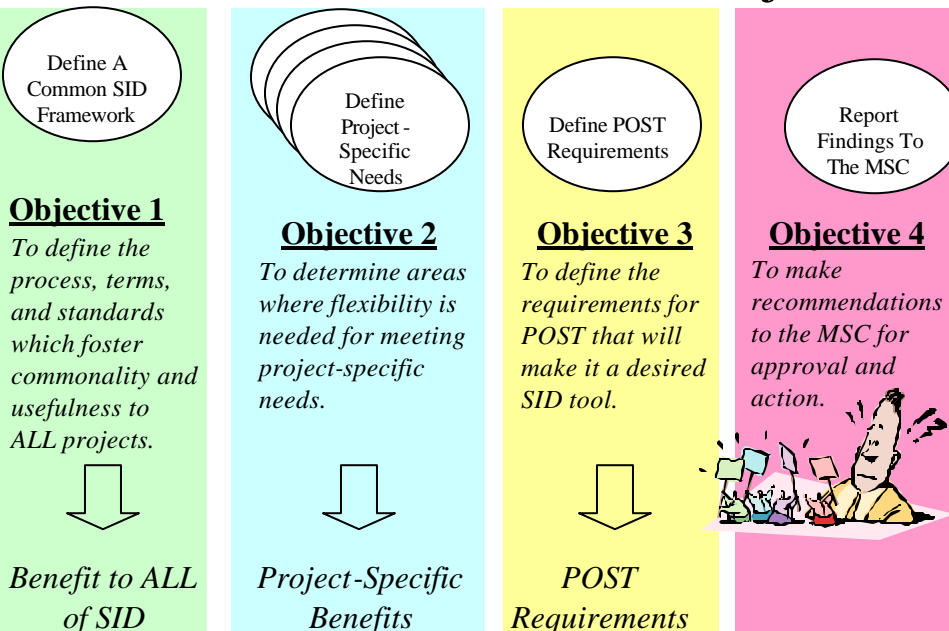
- 2.1 Decide the scope for this PAT based on the needs of the project.
- 2.2 Determine next steps based on scope.

POST Process Action Team (PAT) Configuration Management Phase 1 29 Jan 2002



1

Process Action Team (PAT) Objectives



POST Vision

To have a common suite of tools which standardizes and simplifies the Project Office functions and operationalizes the SID Best Practices and enhances project management capabilities.

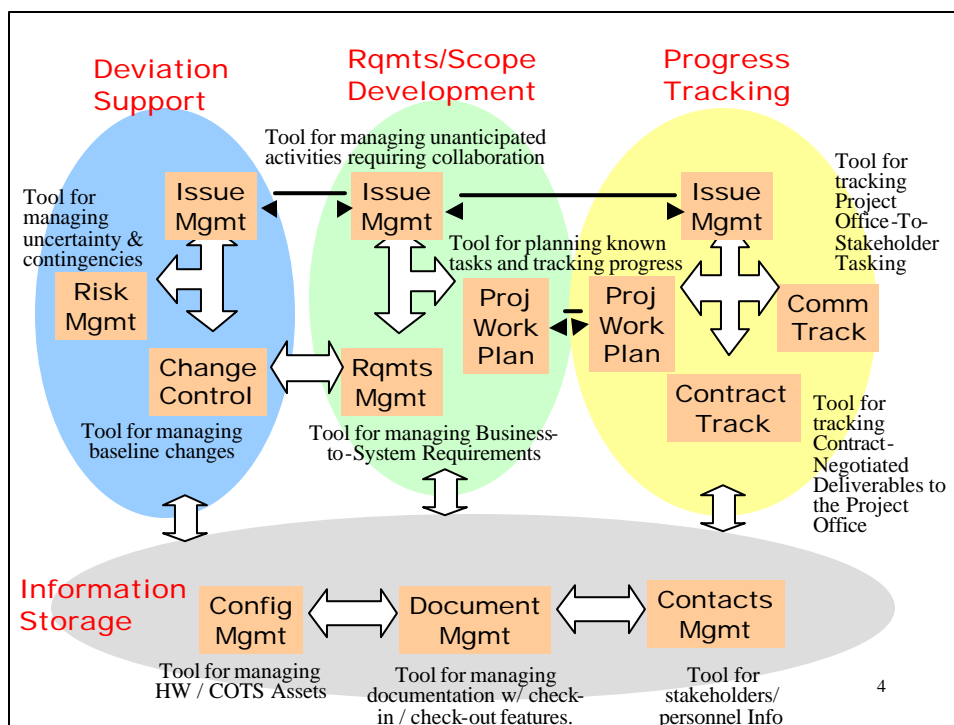
This will be accomplished in three ways:

Goal 1: Establish a suite of automated tools which is simple to use, and minimizes redundancies between project office functions.

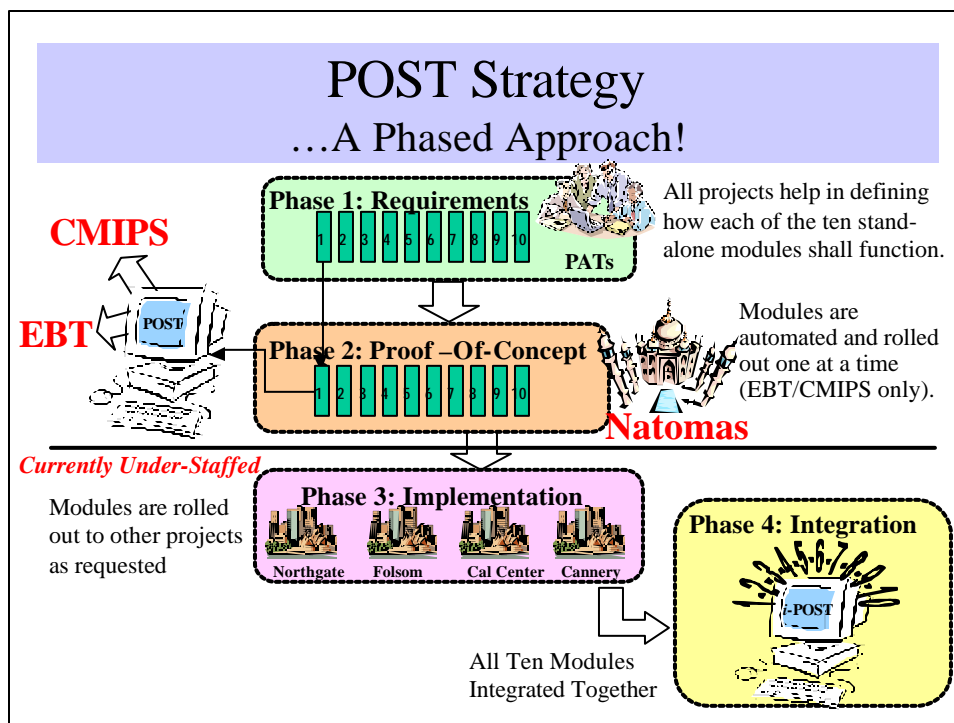
Goal 2: Equip SID employees in applying the tools towards improving project productivity and quality.

Goal 3: To enhance SIDs ability to achieve and maintain SA-CMM Level 3.

3



4



POST Product Suite To-Date

POST Function	Current Tools	Vendor	Programmer Analyst Needed?
1. Document Mgmt	IManage	Infinisys	No
2. Issue Mgmt	MTS/PACS/PTS (MS Access)	In-House	Yes
3. Risk Mgmt	Risk Radar/PACS (MS Access)	SPMN Freeware /In-House	Yes
4. Change Mgmt	PACS/PTS (MS Access)	In-House	Yes
5. Contract Tracking	MTS (MS Access)	In-House	Yes
6. Communication	MTS (MS Access)	In-House	Yes
7. Project Work Plan	MS Project	Off-The-Shelf	No
8. Requirements Mgmt	Requisite Pro /PACS	Off-The-Shelf /In-House	No/Yes
9. Contacts	MS Outlook/MTS (MS Access)	Off-The-Shelf /In-House	No/Yes
10. Config Mgmt	None		

Project Office Support Tool (POST) Strategy

- Purpose of this PAT
 - Identify scope of this PAT (project office, counties, etc.)
 - Identify the generic process for configuration management
 - Identify common terms and definitions
 - Identify the key requirements and features needed for an automated tool
 - Identify current tools in use among SID Projects

7

Phase 1

POST PAT Meetings

- ***Configuration Management*** (weekly)

– 01/29/02	Meeting #1	Scope
– 02/05/02	Meeting #2	Process/Definitions
– 02/12/02	Meeting #3	Requirements
– 02/19/02	Meeting #4	Features
– 02/26/02	Meeting #5	Recommendations
– 03/05/02	Meeting #6	Recommendations (opt)

8

CM Terms

- **Configuration Management**
 - Identifying and documenting the functional and physical characteristics of an item
 - Controlling changes to the item
 - Recording and reporting changes and implementation status of the item
 - Verifying compliance with the items specified requirements
- **Change Control**
 - Evaluating, coordinating, approving/disapproving and implementing changes to items after their initial identification/release
 - The world has changed since we started and we need to make adjustments or corrections
 - One element of Configuration Management
- **Change Management**
 - Managing impacts to the organization based on system changes 9

CM Terms

- **Baseline**
 - A specification that has been formally reviewed and agreed upon, that thereafter serves as the basis for further development, and can be changed only through formal change control procedures
- **Version Control**
 - Management of specific items' specifications and each change made to that item including rationale and approvals
- **Controlled or Configuration Item (CI)**
 - A document, software item, hardware item, or tool which requires a formal level of control over the items description, details and version history

10

What Needs to be Controlled?

- Asset and Inventory
 - Serial numbers, license and warranty info
- Custom Software Modules
 - Code, scripts, environmental files and version info
- Network and Hardware Configurations
 - OS, applications, registry settings, security parameters, etc.
- Documents and Files
 - Refer to Document Management PAT

11

What are Projects Currently Doing?

- What is the scope of projects' CM efforts currently?
 - Project Office Infrastructure Assets/Inventory
 - Contractor Deliverable Asset/Inventory
 - Software Development
 - County Configurations
- Who is responsible for CM efforts? Who participates?
- What tools are being used?

12

Who Participates in CM?

- **Project Staff**
 - Assists with identification of items
 - Adheres to check-in/check-out procedures
 - Assists with maintaining versions
 - May participate in Change Control Process
- **Technical Staff**
 - Assists with maintaining configuration and version information
 - Performs installations and implements approved changes
 - May perform software development for project tools

13

Who Participates in CM?

- **Change Manager**
 - Oversees Change Control Process
 - Coordinates incorporation of approved changes into new system releases with CM Manager
 - Works with Reqmts Manager and CM Manger to establish new baselines
- **CM Manager**
 - Responsible for tracking and overseeing CM process, including baselines and releases
 - Responsible for tracking all CIs, their versions and configurations
 - Responsible for auditing CM files and/or working with QA/IV&V staff to audit CM files and processes

14

Who Participates in CM?

- Project Manager
 - Reviews reports and status from CM and Change Control Process
- County Staff
 - Works with project Technical Staff to coordinate installations in the county
 - Oversees county configurations in the field

15

CM Considerations

- How much control is needed?
 - Amount of control increases as more users are affected
 - Project-only vs. County Sites
 - Amount of control increases the number of items to be tracked increases
 - Amount of control increases as the CIs proceed through life cycle
- When is control imposed?
 - When equipment is delivered
 - When a change is authorized
 - When a work product from the contractor is delivered
 - During implementation

16

Next Meeting

- Review/comment on BP website Configuration Mgmt pages
 - <http://bpweb> or <http://www.bestpractices.cahwnet.gov>
 - Under Life Cycle Processes
 - Refer to the Supporting Processes Area
- Provide input on processes and definitions

17